USER MANUAL

LOAN APPLICATION SYSTEM (LAS)

A Guide for Loan Application Process Participants

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Introduction

Purpose

This document has been designed to walk the Loan Application Process participants through the key functionalities and features provided by the **Loan Application System (LAS)**, and getting themself ready to perform the tasks they are allocated with in this platform.

Providing clear instructions and insights into the main features of the system, this user manual will empower the end users of system, who are the Loan Application Process participants, to efficiently interact with the system and facilitate their contribution to the overall loan approval process.

Audience

This manual is intended for all users who interact with the Loan Application System / Workflow, including Financial Officers, Property Valuers, Insurance Sales Representatives, Loans Assistants, and Loans Assessors.

Overview of the Loan Application System

LAS is a sophisticated platform designed to streamline the loan approval process, which is run in YAWL platform, an application supported by our Information & Technology Department. The system facilitates seamless collaboration among various internal stakeholders, including Loan Officers, Financial Officers, Property Valuers, and Insurance Sales Representatives. The system automates task assignments, ensures data accuracy, and accelerates the processing of loan applications.

Scope

This document provides instructions and insights for how to use the LAS's key features. It does not provide a stet-by-step description of the workflow that takes place during the processing of a Loan Application item.

Assumptions

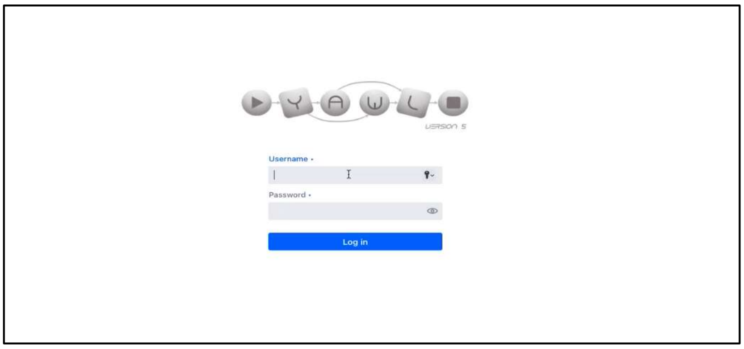
- The process participants have received training on the Loan Application process execution and are clear about their roles and responsibilities on the process.
- The Loan Application System is accessible through the organisation intranet, and it is working as expected.
- The Loan Application System, running in YAWL platform, is fully supported by the Information & Technology Department, part of the organisation. As such, the internal Help Desk team is fully prepared to support the users for the initial system login and ongoing assistance.
- The Loan Application System – Workflow only allows the management of cases related to the Loan Application process. Other organisational workflows are managed in different platforms.

1. Getting Started – System Login

*If you are **working from home**, make sure you…*

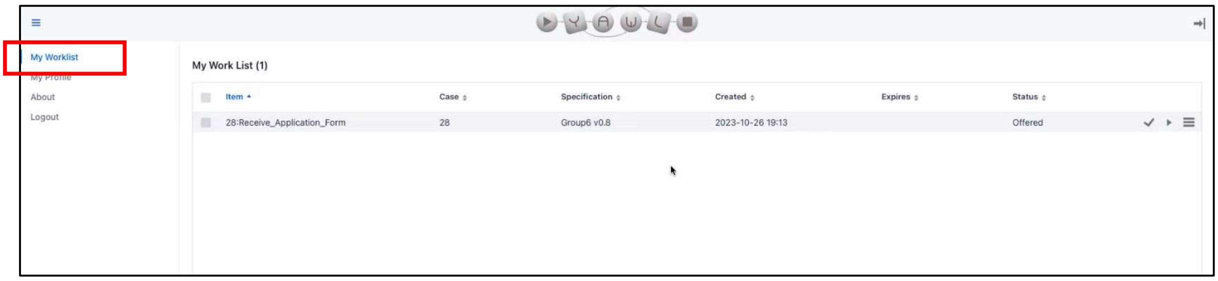
- ***Power up** your personal computer/laptop and login as you ordinarily would.*
- *Once logged in, ensure that your personal computer/laptop is connected to either a hard-wired internet connection or a wi-fi **internet connection**.*

➢ Open the LAS Logon page, by clicking on the Loan Application System icon located in the Intranet.
➢ Sign in with your regular LAS credentials.



Important Note: If you are a new user without prepared credentials, your manager must submit a User Provisioning request to the Help Desk, indicating your need for LAS access and specifying your designated role in the process. The Help Desk will email you instructions for the initial login procedure and changing your temporary password within the system.

Upon successful login, you can view the tasks offered to you and those in progress by selecting the 'My Worklist' option from the menu. The system will automatically display the content of your work list when you log in.



2. Accepting and Completing Work Item

In the Worklist, you can view all the work items requiring your attention.

As a process participant, the following details are relevant to you in the Worklist:

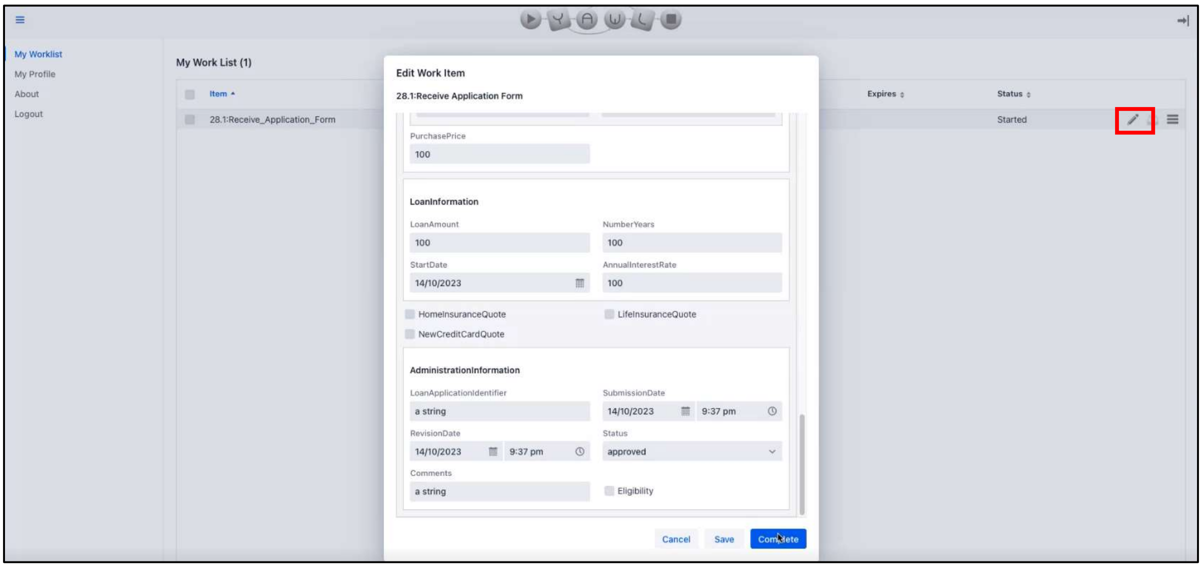
- **Item Name:** Indicates the specific action you need to perform according to the process flow.
- **Item Case:** Displays the task number within the overall process.
- **Created Column:** Provides the allocation date of the item to you.
- **Expires Column:** Specifies the maximum time you have to complete the task, if a deadline has been set.
- **Status Column:** Reflects the current status of the task, updating as you progress. The default status is 'Offered,' indicating no action has been taken.

To **accept a task**, click the 'Accept' icon, as shown in the figure below. This action will update the task status to 'Allocated.' Please note that accepting a task means you are solely responsible for its completion.

To **accept the task and instantly mark it as 'Started,'** simply click the Play button next to the task, as demonstrated in the figures below. This action will prompt the system to update the task status to 'Started'.

To **mark a previously accepted task as 'Started**,' click on the Play button next to the task, following the example illustrated in the figure below.

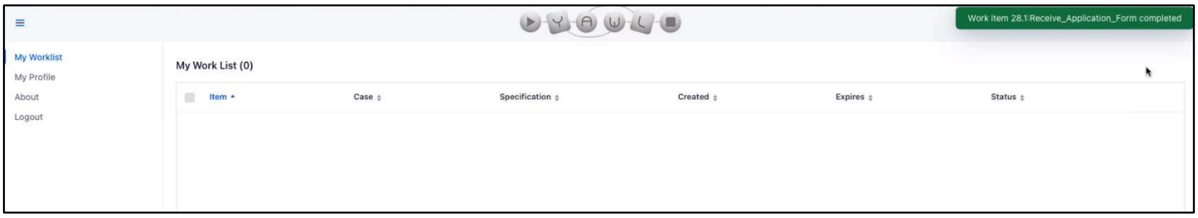
To **initiate the task completion**, click on the Pencil icon next to the task. This action will open the 'Edit Work Item' window, displaying the task details as outlined in the Loan Application Process. Completing the task may involve activities such as data entry, validation, verification, or simply reviewing the necessary information to perform any required activities outside the system.



After initiating work on the item, you have several options:

- **Complete the Task:** If you have finished the task, click the 'Complete' button in the 'Edit Work Item' window.
- **Save Progress:** If you have made progress on the task but haven't completed it, click the 'Save' button in the same window.
- **Postpone the Task:** If you decide to delay the task, click the 'Cancel' button in the window.

If you successfully complete the task, you will receive a completion notification, and the task will be removed from your Worklist. Depending on the current process step, the process might be finalised, or a new task may be assigned to any process participant, including yourself, to continue the workflow.



If the task is either cancelled or saved, it will remain under the 'Started' status in your Worklist.

3. Logging Out the System

There are two ways to log out the system:

- By clicking on the Logout option in the system menu
- By clicking on the arrow located at the top right corner of the screen

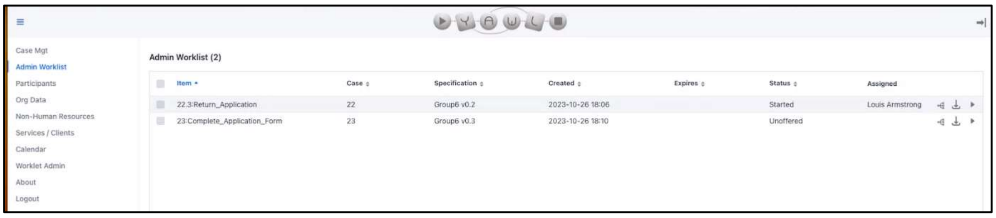
See the figures below.

4. Admin Features for Process Execution

If you have an Admin role in the system, you can utilise special system functionalities to ensure the effective functioning of the process. It is crucial to use the correct admin credentials when logging into the system

4.1 Admin Worklist

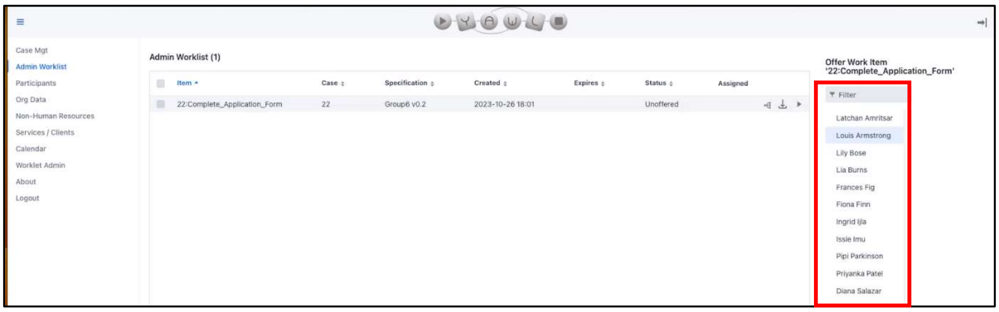
You will access the Admin Worklist, which displays all active tasks (Unoffered, Offered, Allocated, and Started) currently running in the process. This worklist provides information about the task's status, the assigned participant, and the expiration date. As the process admin, this visibility enables you to closely monitor the process execution and promptly address any obstacles if necessary.

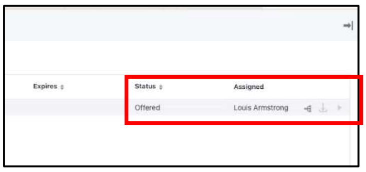


4.2 Task Offering

According to the process definition, certain tasks may require manual offering by the admin to process participants.

To accomplish this, navigate to the Admin Worklist, locate the task to be offered, click the Offer icon next to it, choose the intended process participant, and click the Tick icon at the bottom. See figures below.





4.3 Task Re-Allocation

As a process admin, you have the ability to re-allocate tasks currently listed in the individual Worklist of any process participant, including tasks under the Offered, Allocated, or Started statuses. The steps to follow are the same as those indicated in section 5.2, Task Offering.

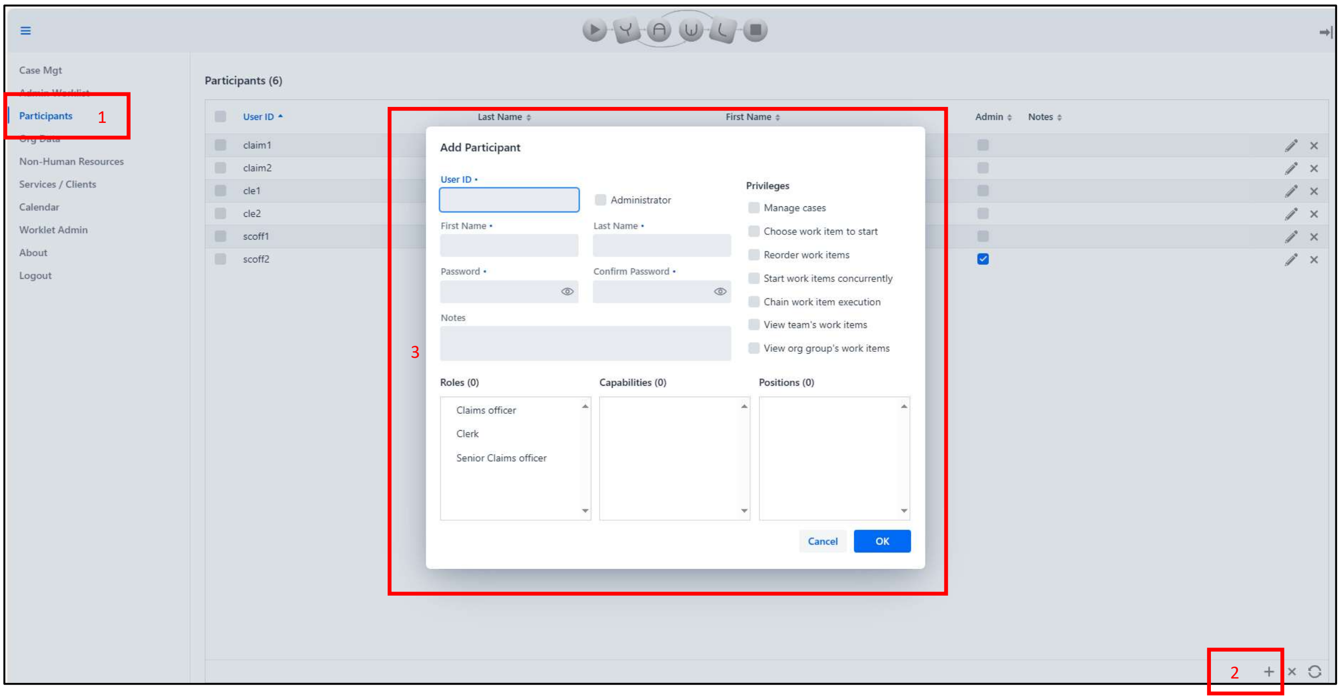
4.4 Other Admin features

The admin can effectively manage the process using various other features, including:

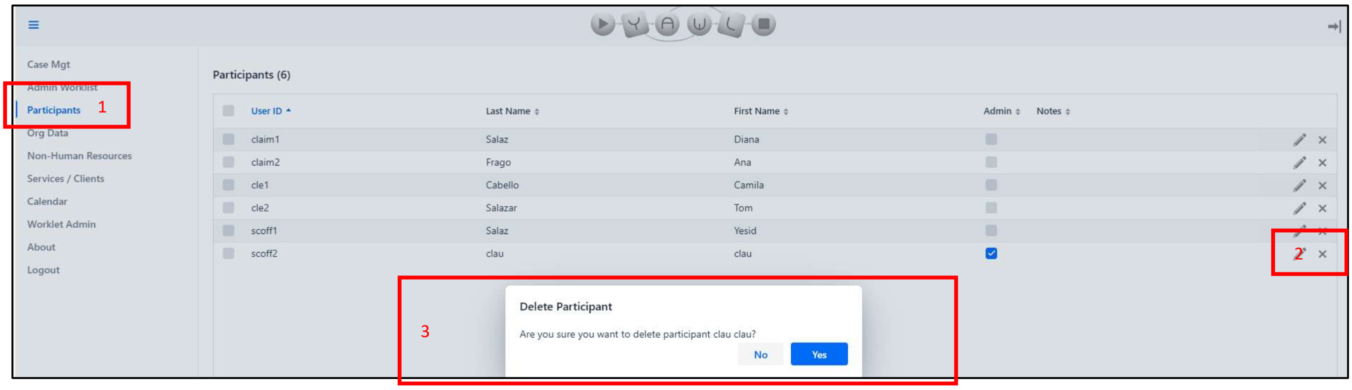
- Enable admin privileges to other process participants
  - Go to Menu option: Participants
  - Tick the Admin option next to the participant

- Delete process Cases
  - Go to Menu option: Case Mgtm
  - Go to Cases table
  - Click the X icon next to the case you want to remove

- Add process Participants
  - Go to Menu option: Participants
  - Click on the Add icon located at the bottom of the screen
  - Complete the new process participant information, click on the OK button



- Remove process Participants
  - Go to Menu option: Participants
  - Click on the X icon next to the participant to be removed
  - Confirm the participant deletion



- Edit process Participants information
  - Go to Menu option: Participants
  - Click on the Pencil icon next to the participant to be updated
  - Update the information as required, confirm the changes